MYOB EXO Business

EXO Training

Job Costing (Advanced)

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This training manual has been developed by the MYOB Enterprise Division - Professional Services Training for use in the delivery of training.

This manual give you advanced skills and knowledge necessary set up and process job costing in your EXO Job Costing system.

This manual has been designed for the following MYOB product:

- EXO Job Costing

MYEBJC

Job Costing Advanced

EXO Job Costing

Course duration: 1 Day

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Edition: 8.7

Participants

This course is aimed at:

- Users of EXO Job Costing.

Prerequisites

Basic PC experience is required.

Understanding of EXO Business and procedures.

Instructional method

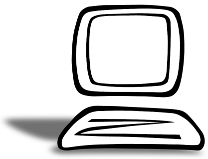
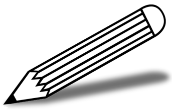
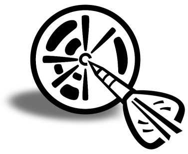
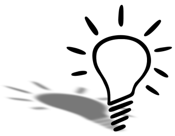
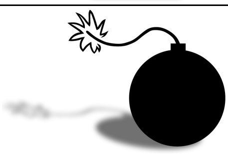
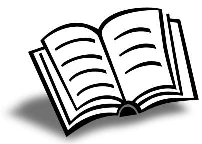
The instructional method combines trainer-led demonstrations with hands-on student practice. You will work through a series of examples. Each unit concludes with a Review Task.

Conventions used in this manual

- Objects such as buttons or icons that you must click or select are shown in **bold**.
- Information to be entered (typed in) is shown in ***bold and italics***.
- Keyboard keys are shown as TAB, CTRL, etc.

Screenshots in this manual are for illustration purposes only and may differ from those in the actual product due to configuration settings.

Symbols used in this manual

Symbol	Name	This symbol tells you...
	**Practice task** **Review task**	… to complete a task to practice the skills you have just learnt, or as a review task at the end of the unit to consolidate what you have learnt.
	**Written Review task**	… to complete written questions to review the content covered in the unit.
	**Optional Challenge**	… to complete this task if you have finished early and are looking for an extra challenge.
	**Tip**	… about helpful tips
	**Note**	… to take note of an important message.
	**Warning**	… about potential problems to be aware of.
	**Important**	… to pay attention to an important notice.
	**New**	… where features are new for EXO Job Costing.
	**Reference**	… where to go to find more information.
	**Skills Checklist**	… to tick off a list of skills that you have learnt during the unit.

Objectives

Upon completion of this course you will be able to:

- Use Kits
- Use Serial Numbers
- Progress Bill and Invoicing
- Use Retentions
- Use and Maintain Serviceable Units
- Set up Custom Buttons

Navigational & Function Keys

MYOB EXO Business can be navigated by keyboard or mouse, however a combination of both is generally used. The standard keyboard convensions for Windows are used, with a few MYOB EXO Business-specific options.

Windows Navigation Keys	
TAB	Moves from field to field, column to column
SHIFT+TAB	Moves backwards from field to field, column to column
ENTER	On open dialogue boxes, automatically select the OK button.
ARROW KEYS	Moves around a grid, or up and down a list.
PAGE UP, PAGE DOWN	Moves between the “sections” of some screens, such as moving from the invoice header to the body to the end.
ALT + (Underlined Letter)	ALT key plus the underlined letter on a field label activates that function, e.g. ALT + N within a the debtor account screen creates a New Debtor.

Using Kits

1

In this unit you will learn how to use Kits in Job Costing.

By the end of this unit, you will be able to:

- Use Kits in Job Costing

Overview

The Job Costing module can handle the inclusion of kitted items (Bills of Materials) in a job. Only Bills of Materials with the **Type** set to 'Kit' can be used in Job Costing - 'Build' and '[Order Template' Bills of Materials are not available for selection.

TIP

See the MYOB EXO Business Help under 'Manufacturing' for full information on Bills of Materials.

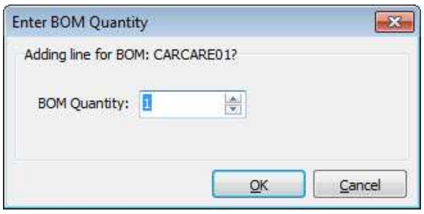
The benefits of this approach to kits are:

- Kits can be moved as a complete unit from Quote tab to the Cost tab and Invoice tab.
- A kit header line is displayed, which shows the cost and sell price of a kit within a job.
- Components can be added to or removed from the kit after it is placed on the job and the cost and sell price will automatically be rolled up.
- Kits can include non-default component options. These are lines that might represent optional variations to the kit. They are not added to the kit cost totals and are not added to the job unless selected afterwards.
- Kit components can be serialised (*Unit 2, 'Serial Number Tracking'*, on page 7).

Kit functionality is available in the Quote tab, Cost tab and Invoice tab on the main Job Management screen.

Adding a Kit to a Job

You can select kits by entering a '.' (full stop) in the Code column and pressing E**NTER**. This opens a list of active kits for you to select from. Bills of Materials of types 'Build' and 'Order Template' do not appear in the list. After selecting a kit, you are prompted for the quantity of kits that you require.



BOM Sales Order Quantity

When inserting a kit, the system will draw its default components into the tab you are on. A kit header displays in bold. Its cost and sell price is calculated from the sum of its component lines, which have a shaded background. Any change to these component lines will result in a change rolling up to the kit header. The job totals are calculated on the sum of the component lines of kits together with normal non-component lines.

The component lines of a kit may be hidden in the grid by ticking the Hide Kit Components checkbox. In this case, only the kit headers will show.

NOTE

Each kit has a unique number assigned to it when it is inserted onto a job. This is so that lines remain attached to their respective kit headers. Lines that are not part of a kit have the value -1.

Kit Options

The following options can be accessed from the right-click menu on any kit line.

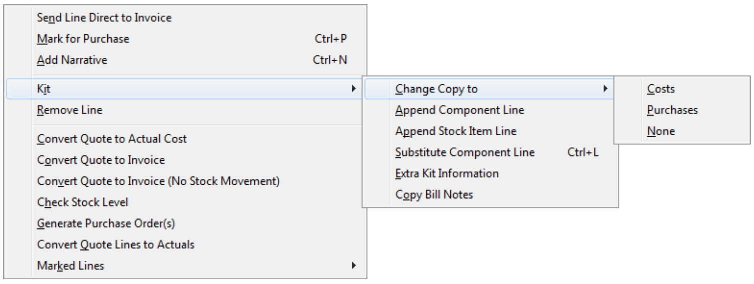
Attach Line to Kit

Right-clicking on a normal (i.e. non-kit) quote or cost line gives the option to attach that line to a kit. At least one kit must exist on the job before this function can be used.

If you select this option, it will offer you a list of kits that exist on this job and if you choose to attach this line, then it will take on the kit ID of the kit chosen and the cost and sell prices for this line will add in to the kit totals. The line will be re-sequenced if necessary and added as the last line of the kit.

Kit Functions

When right-clicking on a **kit header** or one of its components, a different set of options relating to kits becomes available under the **Kit** sub-menu.



Job Costing Kit Options

Change Copy To

You can change the **Copy to** value on the entire kit or on single component line. If it appears that you can build a kit from the available stock on hand, you may choose to copy the entire kit straight to the cost tab when the quote becomes accepted and the job lines become activated. Alternatively, it may be necessary for one or more of the component lines to be purchased directly for the job. In this case, the Purchase Order line will remember the kit ID of the component being ordered, and when it is receipted and costed via inwards goods it will re-join the kit on the cost tab.

Append Component Line

This function allows the user to select additional lines from the Bill of Materials setup for addition to the kit. These are lines that have been marked as non-default and therefore were excluded when the kit was originally added to the job. These non-default BOM lines could be substitute items (used in conjunction with delete line of the original component) or common optional extras.

Append Stock Item Line

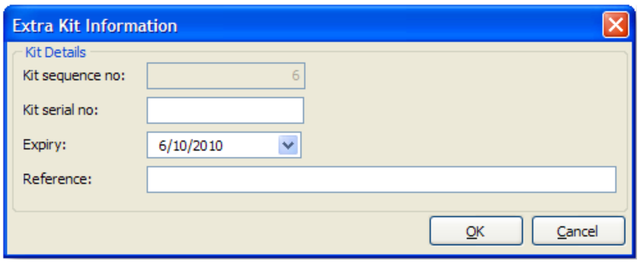
You can append a stock item line from the Stock file. Selecting this option displays the entire stock list in a search screen for selection. The item you choose does not have to be an item pre-configured as optional in the Bill of Materials.

Substitute Component Line

This function is only available when right-clicking on a component line in a kit on the Costs tab. Selecting this option allows you to choose a new component item to replace the selected item.

Extra Kit information

This function allows you to enter additional information for the kit. A periscope-style window is displayed to allow serial number information to be entered if this kit will make an output item:



Extra Kit Information

This information is for record keeping and may be printed on customer reports - the serial does not exist in the main stock serials list. If an asset is produced for the job and this is a serialised (*Unit 2, 'Serial Number Tracking'*, on page 7) item, the serial number must be added there manually. It also does not flow through to serviceable units (*Unit 5, 'Serviceable Units'*, on page 27).

Copy Bill Notes

This function allows you to copy the notes established on the Bill of Materials setup screen into a narrative on the kit header line within the job. The narrative may then be customised as required and therefore the notes of the Bill of Materials may constitute a template.

Duplicate Kit

This function creates another instance of a kit already existing on a job, and is only available when right-clicking on the header line of a kit. Copying a kit is different from inserting a kit from the Bill of Materials setup, in that it will copy any customisations of the kit (such as added lines etc).

Skills checklist

Tick the skills that you have learned in this unit.

Skills	✓
Use Kits in Job Costing	

Serial Number Tracking

2

In this unit you will learn how to track serial numbers in Job Costing

By the end of this unit, you will be able to:

- Track Serial Numbers

Overview

The Job Costing module offers advanced serial number tracking features. This includes the ability to pre-assign serial numbers to work in progress prior to the invoicing stage. Serialised lines can be copied from one job to another along with non-serialised lines by using the **Copy** button on the Quote and Cost tabs.

The mode of serial tracking can be set on individual stock items. Job Costing supports tracking for Debtor Only (Out only), Creditor Only (In only) or Debtor and Creditor (In & Out Only).

NOTE

Limited support is provided for Fully Tracked serials. For a serialised item tracked internally (including Fully Tracked), the system will prevent a line moving from the Quote tab unless a serial number is pre-assigned. Any mode that incorporates the Internal attribute can cause problems with the stock transfers to and from WIP unless the serial is known at all steps. The pre-assignment requirement means that the serial number must exist in stock before the Quote line can be sent to another tab. This particularly precludes creating a Purchase Order inside a job for such an item.

To use these features you must enable two company-level profile settings in the MYOB EXO Business Configurator application:

- **Enable serial number tracking** - This setting gives overall control over the enabling of serial number tracking features in all modules.
- **Allow serial number assignment** - If this setting is not enabled, only the invoice production will prompt for serial numbers.

Using expiry dates is optional. These can be used for Warranty or shelf life limits.

Quote Tab

MYOB EXO Business has a profile setting that allows actual costs to be recorded on individual serial numbers of an item. This is not a form of FIFO stock but does record the cost that the serial was receipted to stock with. This can be useful for high value items where shipments vary significantly in cost. In such cases, when quoting, it may be desirable to know the individual serials cost in terms of negotiating a selling price.

The Quote tab has the ability to display a Pref. Serial# (preferred serial number) column using the Select visible columns right-click menu option for the grid. This allows the operator to choose an existing serial that is in stock and not associated with another job. Enter the usual "?" to search in this column will display a list of serials that:

- Are in stock
- Are not pre-assigned to another transaction (e.g. Job, invoice or Sales order)
- Have not been selected as a preferred serial in another job line

NOTE

This third point makes this list different from just the unassigned serials that occur elsewhere in EXO Business products. Using a serial number in this indication of preference does not lock the serial number from being used elsewhere in the processing like pre-assignment does

When selecting the **Convert Quote to Invoice** option on the Quote tab toolbar, the system displays warning messages if any of the lines to be invoiced contain serialised or batch-tracked stock items

Cost Tab

If serial numbers are enabled and assignment is allowed, then whenever you save the job, the system detects if you have any have serial numbered items. If they have not yet been assigned a serial number and it will give you the opportunity to assign them. This includes serialised items that have been copied from another job using the **Copy** button on the Cost tab. If you have already assigned the serial numbers but want to remove or re-assign them you can call the Serial number assignment screen by clicking the **Save and Prompt for Serial Numbers** button ( ).

NOTE

Serial number pre-assignment does not apply to lines that have not left the **Quote tab**.

Ultimately, you will be forced to reconcile any outstanding serial numbers before you invoice these items.

Purchase Orders

If an item is tracked into store (Creditor) and goods are receipted into work in progress via inwards goods, the serial number will automatically be assigned to the job without need for further user intervention.

If a job line containing a serialised item is cancelled (i.e. its Status is set to ‘X’), then the serial number associated with it is automatically de-assigned and released back into the free serial number list. Cancelling the transaction moves the stock out of work in progress and puts it back into the default stock location.

Skills checklist

Tick the skills that you have learned in this unit.

Skills	✓
Track Serial Numbers	

Progress Billing

3

In this unit you will learn how to manage Progress Billing in Job Costing

By the end of this unit, you will be able to:

- Manage Progress Billing

Overview

Progress Billing is sometimes also known as contract invoicing.

NOTE

This is an advanced feature. It is recommended that you consult with your MYOB EXO Business channel partner before implementing.

Progress Billing allows a group of job cost lines to be allocated against Billing Schedule entry for costing purposes.

An extension to progress billing is retentions. Retention is a value proportion of the progress bill which the client withholds from payment as a quality guarantee on the job. It becomes due for payment, and is billed at a later date.

Generating Billing Schedules

Progress Bills are charged through a lookup stock item whose code starts with the '@' character. One of these will have been automatically created in your database.

A progress billing entry may be created in several ways:

- On the Quote/Billing tab , the **Marked Lines** submenu will have an option to **Generate Billing Schedule**.
- On the Timesheets, Costs and Invoice tabs, the Marked Lines submenu will have an option to **Allocate to Progress Invoice**.

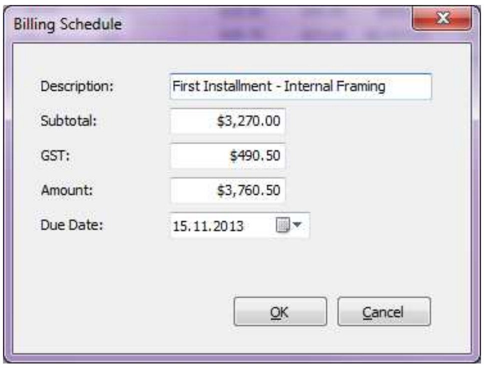
From the Quote tab

The Generate Billing Schedule function allows a schedule for billing to be created at the time of quote.

1 On the Quote tab, mark some lines that have not been sent to another tab.

2 On the right-click menu select **Marked Lines > Generate Billing Schedule**.

3 A schedule window will appear for you to overwrite a description. The values cannot be altered, however the due date for the invoice can.

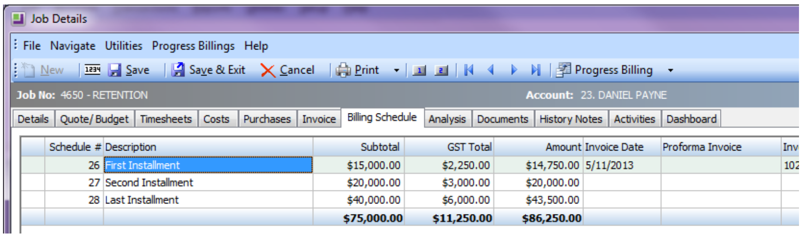


Job Costing Billing Schedule

4 Click **OK**.

If you want additional schedules then you can repeat this for additional groups of marked lines.

These schedules will now appear on the Billing Schedule tab.



Job Costing Billing Schedule Tab

You can also create schedules manually on the Billing Schedule tab by pressing the down arrow on the grid and manually entering in a new schedule. You can then specify the value manually for billing in the subtotal field.

Invoicing Billing Schedules

Proforma Invoices

Proforma invoices may be generated from each of the scheduled bills. Highlight the schedule that you wish to action. The option to generate proforma invoices is available in two places:

- Select **Progress Billing > Proforma Invoice** from the toolbar on the Billing Schedule tab.
- Right click on a line on the Billing Schedule tab and select **Proforma Invoice**.

Selecting this option opens the standard EXO Business Invoice Entry window. You now have the option to add extra items to the Invoice which currently shows all items passed from the quotation tab.

The invoice will print with a number allocated against it and this will be shown in the Proforma Invoice column.

Tax Invoices

The **Progress Billing** button and right-click menus also have options for creating a true tax invoice (**Create Invoice**).

Selecting this option opens the standard EXO Business Invoice Entry window with all the lines previously entered. You do have an opportunity to add extra items if you like.

After invoicing, the invoice number will show in the Invoice No column and the background colour of the row will be green. The right-click menu now includes an option to **View Invoice** and **Print Invoice**.

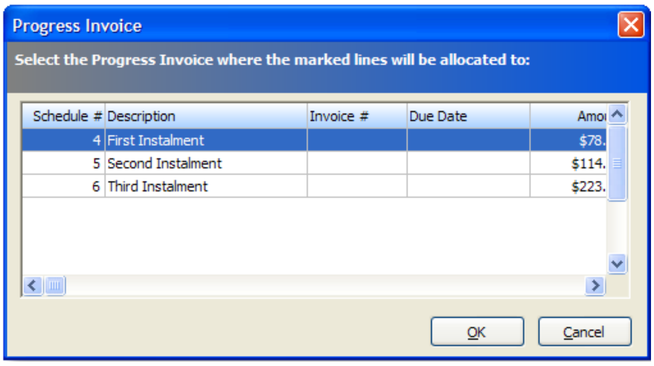
NOTE

Be sure to set up the appropriate General Ledger code in the GL Code column before invoicing.

Allocating Costs in Progress Lines

Work in progress lines on the Timesheets, Costs and Invoice tabs can also be allocated (added) to a billing schedule. Mark the required lines and from the right click menu select **Marked Lines > Allocate to Progress Invoice**.

The system will prompt for the progress invoice to which the lines are to be added.



Job Costing Progress Invoice

Click **OK**. for the cost values will have associated to the billing schedule line.

NOTE

You can only allocate against Invoices that have been printed or emailed first. If they haven't been printed/emailed then they won't appear in the list of invoices to allocated against.

Adding Information

Additional information can be added to the schedule by completing the following columns:

Field	Description
Invoice Date	Shows the date the Pro forma or invoice was originally printed.
Allow Allocation	Select '**Y**' to allow work in progress lines to be allocated to the billing schedule. If '**N**' is selected, the schedule will not appear on the Progress Invoice window for allocating lines.
Allocated Cost	Shows the total of items allocated against each invoice.
GL Code	The General Ledger code the schedule is to be billed to.
Percentage Complete	Enter a percentage to allow monitoring of progress of WIP relative to the schedule.

Skills checklist

Tick the skills that you have learned in this unit.

Skills	✓
Progress Billing	

Retentions

4

In this unit you will learn how to manage retentions in Job Costing.

By the end of this unit, you will be able to:

- Manage Retentions

Overview

Retentions apply in some industries, such as the building industry, where the customer retains a certain portion of the bill to ensure that any follow up work required for merchantable quality is provided. From an accountant's perspective this can be a complex topic and advice is recommended before implementing this option.

NOTE

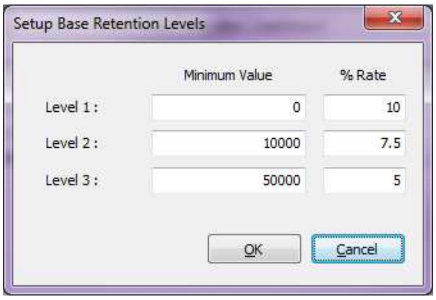
This is an advanced feature that has limited functionality.It can be used for basic retentions. It is recommended that you consult with your MYOB EXO Business channel partner before implementing.

Retentions are an additional option that may be used to extend the functionality of progress invoices. Like Progress Billing, retentions are not activated in a standard Job Costing install and therefore associated properties do not appear by default. This is activated via the Miscellaneous Profiles.

Default Retention Rates

You will need to add the menu item **Setup Retention Rates** to the menu of your Job Costing main form via the menu editor in the MYOB EXO Business Configurator at **Staff > Menus > Dropdown Menu**. This will allow you to set the default retention levels for use in your database.

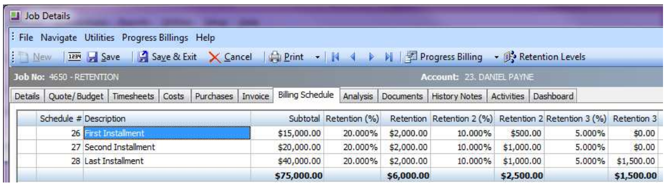
Select this menu item to establish the base rates appropriate to your industry.



Set-up Base Retentions

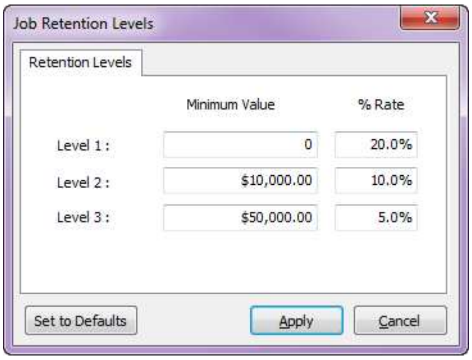
Creating Retentions in the Billing Schedule

When retentions are active, additional columns are available on the Billing Schedule tab and a **Retention Levels** button appears on the toolbar:



Job Costing Retention Schedule

To set the retention values for a row, highlight the row and click this button. The Job Retention Levels window appears:



Job Costing Retention Levels

Either click **Set to Defaults** to pick up the base rates established earlier or enter the default levels and rates manually. Click **Apply**.

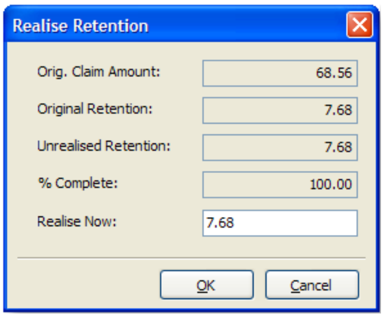
The retention rates and computed dollar amounts appear in the various Retention columns on the Billing Schedule tab. These columns are not editable, but may be reset using the **Retention Levels** button again.

When the tax invoice is created for a row containing retentions, the retention value shows as a deduction on the invoice. This utilises a stock item with code RETENTION (this item is automatically created in your database).

Realising a Retention

Realising a retention means invoicing that retention. To realise a retention, right-click on the cell value of the retention you want to realise, then select **Realise Retentio**n.

The Realise Retention window opens, allowing you to adjust the value you wish to invoice.



Job Costing Realise Retention

Click **OK**. An Invoice window appears.

Complete this in the normal manner. The cumulative retentions value will now appear in the **Retention Realised** column. Repeat the process when further retentions need to be realised. The value in the popup will default to the balance due.

Skills checklist

Tick the skills that you have learned in this unit.

Skills	✓
Manage Retentions	

Serviceable Units

5

In this unit you will learn how to create and maintain Serviceable Units.

By the end of this unit, you will be able to:

- Install Serviceable Units
- Create a Serviceable Unit
- Use a Serviceable Units in a Job

Overview

Serviceable Units is an advanced feature of the Job Costing module. It is recommended that you consult with your EXO Business channel partner before implementing.

Serviceable Units refer to items on which work may be required. These could be assets of the company running the Job Costing module or assets owned by their customers (perhaps previously sold to the customer).

Serviceable Units can maintain a significant amount of information and history for the unit. To that extent they could be thought of as technically similar to Contacts but applying to asset items rather than people.

A Serviceable Unit may optionally be associated with a stock item code and may even be associated with a serial number of that stock item.

Serviceable Units may also have parent child relationships.

NOTE

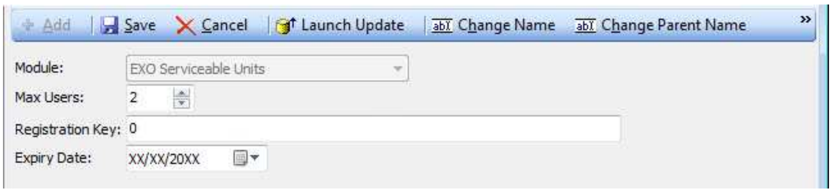
When this Units feature is enabled, an extra Serviceable Units tab is available on the Debtors screen in the core EXO Business application. This tab lists any Serviceable Units relating to the Debtor account.

Installing Serviceable Units

Serviceable Units functionality is not installed by default. To add this functionality, a licence code for Serviceable Units must be acquired and installed. (The Serviceable Units feature does not have a separate executable; the functionality is included in the Job Costing module and the MYOB EXO Business core product when installed.)

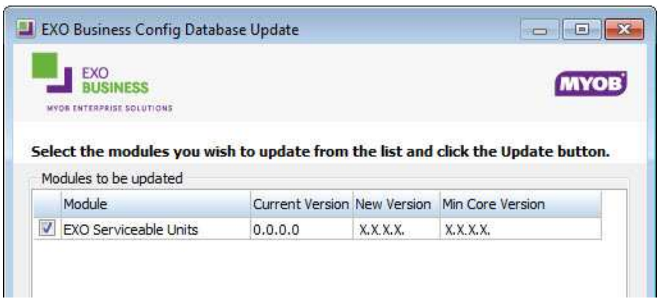
To install this licence:

1. Open the MYOB EXO Business Configurator application and click the **Add** button on the **Company > Registration** section.
2. Select Serviceable Units in the dropdown list and fill out the licence details supplied with your licence.



Add Serviceable Unita

3. Click **Save**.
4. You now have to add the required additional tables and fields (metadata) to your database. To do this, click the **Launch Update** button. The Database Update window shows EXO Serviceable Units in the top grid.



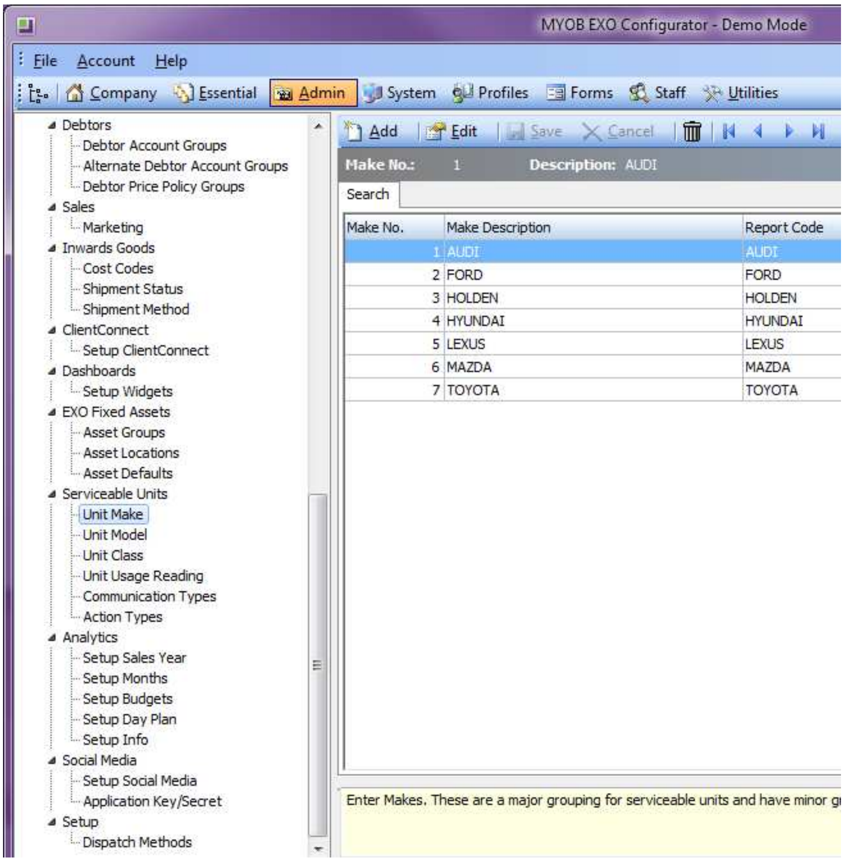
Serviceable Units Upgrade

5. Click the **Update** button at the bottom of the screen to complete the task.

Serviceable Units functionality is now available in the Job Costing module.

Configuring Serviceable Units

Once the Serviceable Units feature has been installed, a Serviceable Units node becomes available in the Business Admin section of the MYOB EXO Business Configurator application.



Serviceable Units Unit Make Set Up

The sub-nodes under this node allow setup of a number of codes and descriptions for various properties that may be set for a serviceable unit. These include:

- Unit Make
- Unit Model (subsets of Unit Make)
- Unit Class
- Unit Usage Reading
- Communication Types
- Action Types

TIP

Makes, Models and Classes can be created from the Serviceable Units window if the Allow creation of new Make, Model and Class User-level profile setting is enabled.

Serviceable Units can also be assigned one or more warranties. Set up warranties in the Configurator at **Business Admin > Stock > Warranty**.

You can also set up the Job Costing menus to provide direct access to the Serviceable Units screen under the Accounts menu. This is done via the menu editor in the Configurator at **Staff > Menus > Dropdown Menu**.

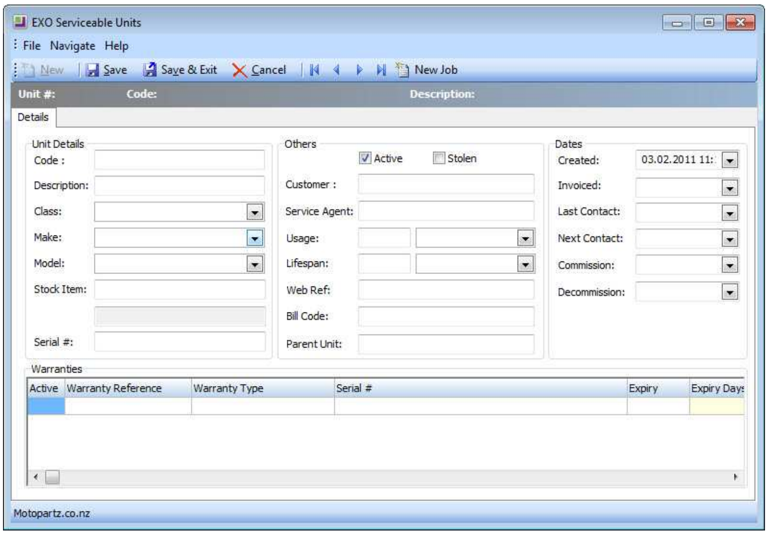
Creating Serviceable Units

It is also possible to create a Serviceable Unit directly on the Job Management screen. This accommodates creating a unit on the first job when that unit is encountered, e.g. a new client brings their car in for servicing. If you have added the Serviceable Units option to your menu, you can create Serviceable Units independently of a job and then use them in a job at a later time e.g. selling a car and anticipating it being brought in for servicing. In either case the Serviceable Units screen is identical for both workflows.

When the Serviceable Units feature is installed (*'Installing Serviceable Units'* on page 29), the Details tab (*'Creating Serviceable Units'* on page 32) on the Job Management screen shows an additional Serviceable Units sub-tab at the bottom of the screen. This allows pre-loading a list of units to be referenced on the job. New units may be created here or selected from the global list of units previously created.

To create a serviceable unit, right click on the Serviceable Units sub-tab and select **Create New Serviceable Unit**. Alternatively, you can click the **New** button on the Serviceable Units search window.

The Serviceable Units window appears:



Job Costing Serviceable Units Detail

Most of these fields are self-explanatory however some comments follow:

- **Serial #** only applies if the stock item is serialised (*Unit 2, 'Serial Number Tracking'*, on page 7).
- Both the **Customer** and **Service Agent** can be chosen from a search window of companies (list contains both Debtors and Creditors).
- **Bill code** refers to a Bill of Materials code (optional).

A **New Job** button is available on this tab to create a new job from the Serviceable Units window.

If the **Allow creation of new Make, Model and Class** User-level profile setting is enabled, a button is available on this tab to create Makes, Models and Classes from the Serviceable Units window.

Warranties

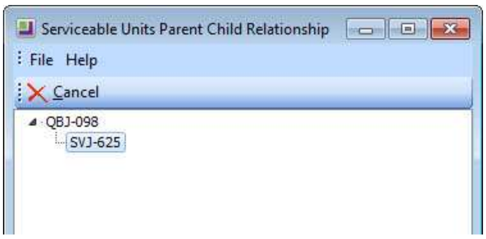
Warranties are optionally added by right clicking in the warranties grid and selecting **Insert Warranty**.

Parent Child Units

Serviceable units can optionally be organised into parent-child relationships. More than one level of relationship is permitted.

To establish a unit as being a child of another unit, specify the parent unit for the **Parent Unit** field.

From any unit the parent child relationship tree can be viewed by clicking the  toolbar icon.



Serviceable Units Parent Relationship

The current unit will be highlighted in the tree. Any other unit may be drilled to (opens another instance of the Serviceable Units screen).

Additional Tabs

Once the required information on the Details tab is entered, additional tabs become available. Most of the additional tabs on the Serviceable Units window work in a similar way to their equivalents in the Debtors or Creditors account screens and are documented in the main MYOB EXO Business online Help. They are listed here with brief descriptions.

Contacts

The unit may have changed hands during its lifetime. The Contacts screen can be used to create a list of contacts associated with the unit, therefore the item is another entity that may form a role with each of these contacts.

Contact History

This tab displays history notes for the serviceable unit. This operates in similar fashion to Debtors accounts but the history is tagged to the unit.

Serviceable History

This tab displays any transactions that are associated with the unit. A **New Job** button is available on this tab to create a new job from the Serviceable Units window.

Notepad

Free-form text can be entered against the unit.

Schedules

A maintenance schedule can be established on this tab. This can comprise multiple entries.

Click **New Schedule** to add an entry or double-click an existing entry to edit it.

Docs

This tab allows the Document Manager function to link external documents to the unit.

Using Serviceable Units in Jobs

The list of serviceable units entered on the Details tab (*'Configuring Serviceable Units'* on page 30) of the Job Management window forms a short list of units that may participate in the job.

One of these units will be the default. The default may be changed by right-clicking another unit and selecting **Set as Default**.

Pre-existing serviceable units may also be added to the job by right clicking in the grid and selecting **Assign Serviceable Unit** and then selecting from a search screen. A unit may be removed from the job by right clicking it and selecting **Unassign Serviceable Unit**.

Assigning Job Lines to Serviceable Units

When the Serviceable Units module is installed, you can use the **Select visible columns** function of the ExoGrids on the Timesheet, Costs, and Invoice tabs to show a Serviceable Units column.

To change the serviceable unit on a line, enter '?' in this column to select a Serviceable Unit from the short list entered in the job details tab. A search screen of these units appears.

NOTE

Lines added to a job will automatically be tagged to the default serviceable unit listed for the job. It is therefore recommended that you construct the serviceable units list on the Details tab of the job before adding lines to the job.

Skills checklist

Tick the skills that you have learned in this unit.

Skills	✓
Install Serviceable Units	
Create a Serviceable Unit	
Use a Serviceable Units in a Job	

Custom Buttons

6

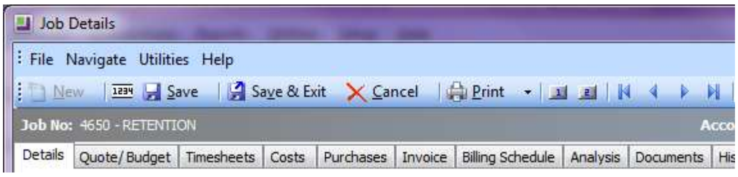
In this unit you will learn how to set up custom buttons in Job Costing

By the end of this unit, you will be able to:

- Set up custom buttons

Overview

Job Costing incorporates custom buttons that can call an executable file (a file which will run another portion of MYOB EXO Business) and pass it the connection name, user name, password and job number. This could be a Job Costing related program, or a special report such as a Clarity report.



Job Costing Custom Buttons

It is possible to define up to nine extra buttons each of which can execute external applications or run reports. Each button is defined by two properties:

- The name or caption to appear on the button, or when the mouse pointer hovers over the button (limited to 15 characters).
- The action to be performed. To run a Clarity report, only the report file name is required; otherwise normal parameters are passed automatically, i.e. <filename.exe> Aliasname - Login - Password - Jobno parameter

Custom buttons are set up using the MYOB EXO Business Configurator application, where they are configured as User-level profile settings.

Button	Appears On	Common Use
1.	Search Screen	Job List (status) Report
2.	Details Screen	Single Job Summary Reports
3.	Details Screen	Single Job Summary Reports
4.	Quote/Budget Screen	Print Quotation
5.	Time Screen	Single Job Time Sheet Summary
6.	Cost Screen	Single Job Materials Summary
7.	Purchases Screen	Purchase Lines Report By Job
8.	Invoice Screen	Invoice Preview
9.	Performance Screen	Custom Performance Summary

Consult an EXO Business Partner for more information on settings these buttons.

Skills checklist

Tick the skills that you have learned in this unit.

Skills	✓
Set up custom buttons	